

**The Montana Shared Catalog Partners Resource Sharing Group (Partners)
Membership Preparation Plan**

The following document is a checklist of issues and expectations that prospective new Partners libraries can consult when preparing a plan of action for membership application in the Partners consortium. It indicates some resources, processes and procedures that a new member should be considering as a Partner library.

Prospective Partner members can use this form to design a preparation plan for membership. It can be shared with current Partner members as part application for membership process. For each item on the checklist, space has been provided to add details or comments, if desired.

APPLICATION FOR MEMBERSHIP

_____ Visit made to at least one Partner Library to educate applicant about the consortium

_____ Request to appear on agenda of next Partner bi-annual meeting submitted

_____ Presentation on application for membership to Partners prepared

ADMINISTRATIVE

_____ Library has joined the Montana Shared Catalog (MSC) and has used the MSC Symphony ILS in production mode for a minimum of three months

Date of admission to the MSC:

_____ Library has met with MSC representatives and conforms to MSC specification standards and guidelines

_____ Library commits to Partners’ principles of resource sharing and the concept of a “borderless” approach to item ownership, clientele and customer service

_____ Library has reviewed the Partner Membership Policies and Procedures and agrees to follow all obligations and procedural responsibilities outlined within the document

_____ Library has reviewed the Partner Bylaws and agrees to follow all tenets outlined within the document

_____ Library agrees to abide by the Montana Library Records Confidentiality Act and will ensure that patrons’ personal information will not be shared or made available to anyone other than library staff

_____ Library has investigated and understands the cost involved in being a Partner library (see Appendix II)

STAFFING

_____ Demonstration that adequate staff and/or volunteer(s) hours are in place to:

- _____ Pull expired holds each day of operation
- _____ Retrieve off-shelf holds each day of operation
- _____ Package holds for delivery to Partners each day of operation
- _____ Receive and check in returning items
- _____ Search for missing on-shelf holds for a maximum of two days
- _____ Check out missing on-shelf holds to the library's TRACE account

_____ Staff member designated to manage on-going Partner membership issues. This includes:

- Representing the library in quarterly Partner teleconferences and bi-annual Partner meetings
- Serving as primary contact for other Partner libraries
- Notifying partner equivalents about missing on-shelf holds so Partner libraries can remove holds from respective patrons' accounts
- Resolving in-transit discrepancies at least once a week
- Managing and maintaining the Partners Order of Holds Fill Matrix
- Monitoring and troubleshooting all other holds related reports

_____ Training plan for staff and/or volunteers prepared

CIRCULATION

_____ Consultation with MSC arranged to configure library holding to circulation rules required by Partner libraries. This includes:

- Permitting all Partner Library cardholders to register and use library cards at the library
- Unlimited checkouts, except where precluded
- 28 day and 14 day checkouts for items
- Renewal limits and restrictions

- Allowable fines
- Hold notification and expiration rules
- In transit and pick-up location specifications
- Scheduled reports

_____ Cataloging standards recommended by the MSC and required by Partners followed

_____ ID bar codes are horizontally placed on the face of all items available for circulation to Partner libraries

_____ Library item types conform to universal set of item types that are mutually agreed on and managed by the Montana Shared Catalog

COLLECTION MANAGEMENT AND DEVELOPMENT

_____ Library commits to maintaining and sharing a robust, dynamic and viable collection that benefits its own patrons and all Partner patrons across the state of Montana

Please indicate in general your purchasing pattern

_____ Library commits to purchasing materials as necessary based on internal holds reports and circulation statistics

_____ MSC system administration's determination of library's position in the Partner Order of Holds Fill Matrix completed

_____ Maximum ratio of hold per title before purchase determined and established

Please specify the ratio determined:

_____ Reviewed Partner floating collection concept as an option for consideration

SHIPPING AND PACKAGING

_____ Courier or other means of transportation selected and contracted to receive and deliver Partner materials

_____ Delivery schedule for shipments received and sent confirmed

_____ Procedure determined for clearly labeling and packaging crates and or bundles of items for delivery to Partner library destinations

_____ Crates, bungee cords, and other supplies required for safe, secure delivery of shipped items have been purchased

_____ Adequate space for accurate sorting and receiving of incoming and outgoing materials Identified within the library

Appendix I

Partners is a sub-group of Montana Shared Catalog libraries. Together, the Partners form a consortium of libraries who have agreed to take down walls and share their respective collections with each other for the ultimate benefit of their own patrons and patrons in various communities across the state.

The mission of Partners is “to provide Montana Partner Library users self-service access to the materials of all participating libraries.” Its core values are to ensure their “collections are available to all Partner Library users” and that their “users’ needs for efficient and consistent service are the focus of... decision-making.” Partners realize their mission and values through their patrons placement of holds on items owned by participating member libraries and the delivery of items through a combination of mail and courier service to the patron's home library.

Members at this time include:

- Bitterroot Public Library - Hamilton
- Drummond School-Community Library
- Flathead County Library & Branches
- Glendive Public Library
- Hearst Free Library - Anaconda
- Lincoln County Libraries
- Miles Community College Library
- Miles City Public Library
- Mineral County Public Library
- Missoula Public Library & Branches
- North Valley Public Library - Stevensville
- North Lake County Library District
- Rosebud County Library & Branch

Appendix II

The long-term cost benefit of joining Partners will eventually outweigh any upfront costs a prospective library faces upon first becoming a member. But the prospective library should be aware of and keep in mind that there are costs to be considered. Partners can assist a new member with selection on purchases and following best practices learned since the consortium's establishment.

In general, there are costs to new members in the following areas:

1. Supplies for packaging and shipping (crates, bungee cords, etc.)
2. Transportation or courier service costs
3. Staffing and training